

Institute of Transport and Logistics Studies (ITLS) Transport Opinion Survey (TOPS)

Quarter 1, March 2013

Highlights

Infrastructure increases as highest priority national issue

- In the March 2013 quarter, 8% of Australians nominated transport and 15% nominated infrastructure as one of the two highest priority issues in Australia today.

Public transport the highest priority for transport

- Over half (53%) of Australians said that the highest priority issue for transport in Australia is public transport improvements, followed by road improvements (26%).

Transport not changing in local area

- 56% of Australians said that transport in their local areas is the same now as one year ago, up from 55% in the September 2012 quarter (the last survey period).

Low level of confidence about local transport in short-term

- Only 18% of Australians said that transport in their local areas will be better in one year's time.

Views stable on transport in Australia in short-term

- 24% of Australians think that transport in Australia will be better in one year's time, up from 20% in the September 2012 quarter.

Australians confident about transport in Australia in longer-term

- Australians continue to be more confident that transport in Australia will be better in five years than in one year, with 46% thinking that transport in Australia will be better in five years.

ITLS Index of Transport Confidence

- Compared to the launch of TOPS in March 2010, Australians are much less confident about transport in their local areas in March 2013 (Confidence index: from 100 to 88), unchanged in confidence about transport in Australia in one year, and less confident about transport in Australia in five year (Confidence index: from 100 to 97).

Flexibility in Home Departure Time of Peak Car Driving Commuters

- Half of the residents in Australian capital cities reported that they drive to work during peak periods at least one day per week.
- 66% of peak car driving commuters in capital cities said that they have no flexibility in selecting the departure time to work, whilst 34% said that they have plenty of flexibility.

Response to Peak Period Road Pricing of Peak Car Driving Commuters

- If there was a peak period charge of 5 cents per km imposed on all major roads, 13% of peak car driving commuters in capital cities said that they would switch to public transport, and 22% would switch out of the peak periods and drive to work during the off-peak periods instead.

About the Transport Opinion Survey

The Transport Opinion Survey is a quarterly survey of 1,000 adults aged 18 years and over across Australia launched in March 2010. The sample is representative of Australia's population distribution and demographic characteristics. Interviews are conducted by telephone by Taverner Research using trained interviewers.

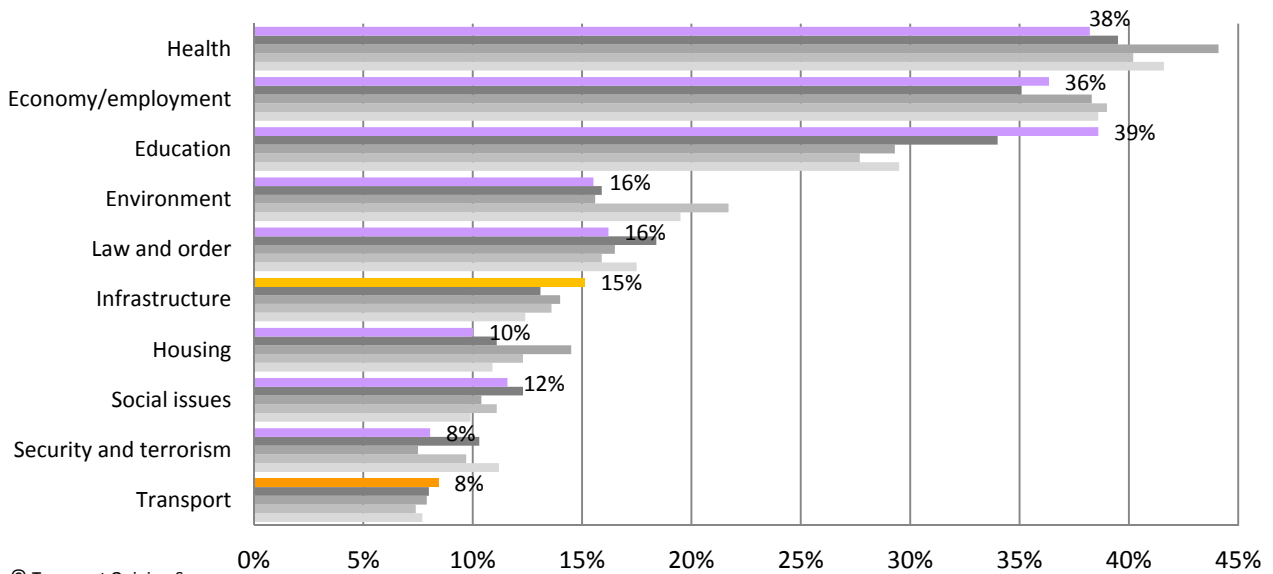
The Quarter 1, March 2013 survey was conducted over 23 March-13 April 2013. Current issues in this quarter included the flexibility in home departure time and response to peak period road pricing of peak car driving commuters.

Transport as a national priority

Which two of these issues [from list of 10 issues in random order] do you think are the highest priority in Australia today?

- In the March 2013 quarter, education was the highest priority issue in Australia, nominated by 39% of Australians, followed by health (38%) and economy/employment (36%).
- 8% of Australians nominated transport as one of the two highest priority issues in Australia today, and 15% nominated infrastructure.

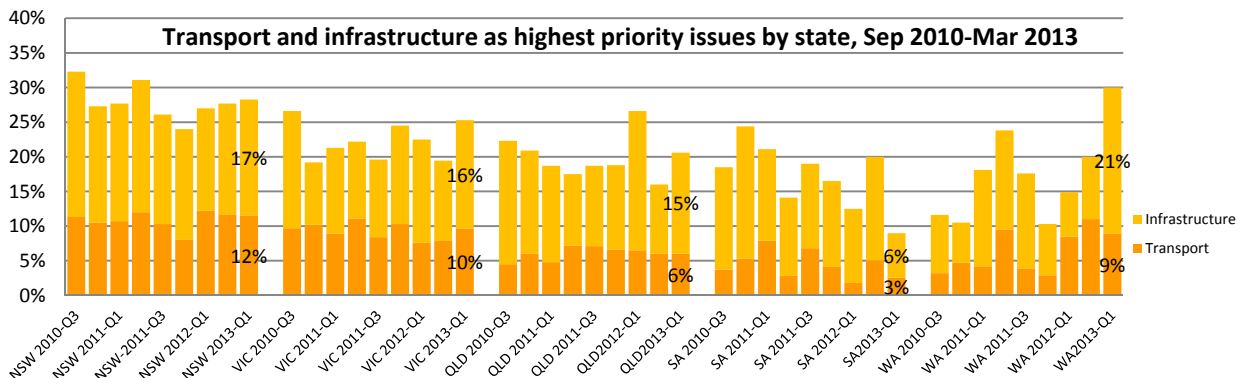
Highest priority issues in Australia, Sep 2011-Mar 2013



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Note: Responses sum to 200% for this figure only. March 2013 results are the top bar with % value, and previous four quarter results (September 2012, March 2012, December 2011, and September 2011) are the lower bars in grey.

- In the March 2013 quarter, transport was most important in NSW (12%) among all states.



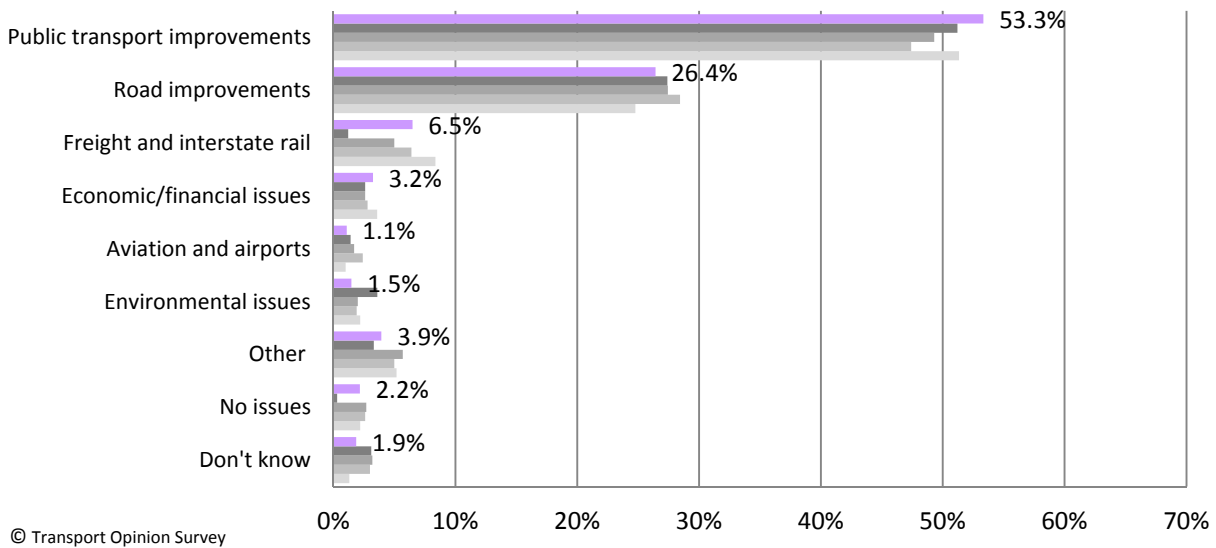
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1. Highest priority issue for transport

What do you think is the highest priority issue for transport in Australia now?

- In the March 2013 quarter, over half of Australians (53.3%) said that the highest priority issue for transport in Australia is public transport improvements. Public transport has been the highest priority transport issue in the eleven quarters of the survey. Over a quarter of Australians (26.4%) nominated road improvements.

Highest priority transport issue in Australia, Sep 2011-Mar 2013



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Note: Responses sum to 100%. March 2013 results are the top bar with %value, and previous four quarter results (September 2012, March 2012, December 2011, and September 2011) are the lower bars in grey. Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, issues not included in other categories, and rebuilding transport after disasters.

- All states regard public transport improvements as the highest priority issue in transport, especially in Victoria (65%).

Highest priority transport issue by state, Mar 2013

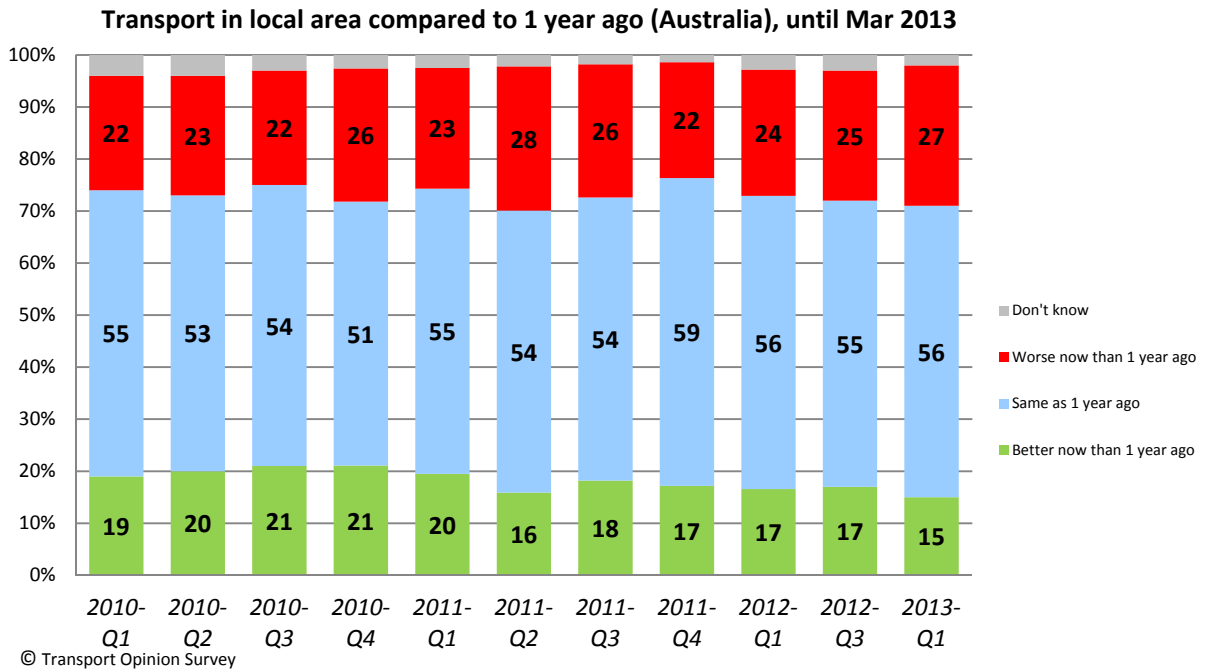


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2. Confidence about transport improving in local area

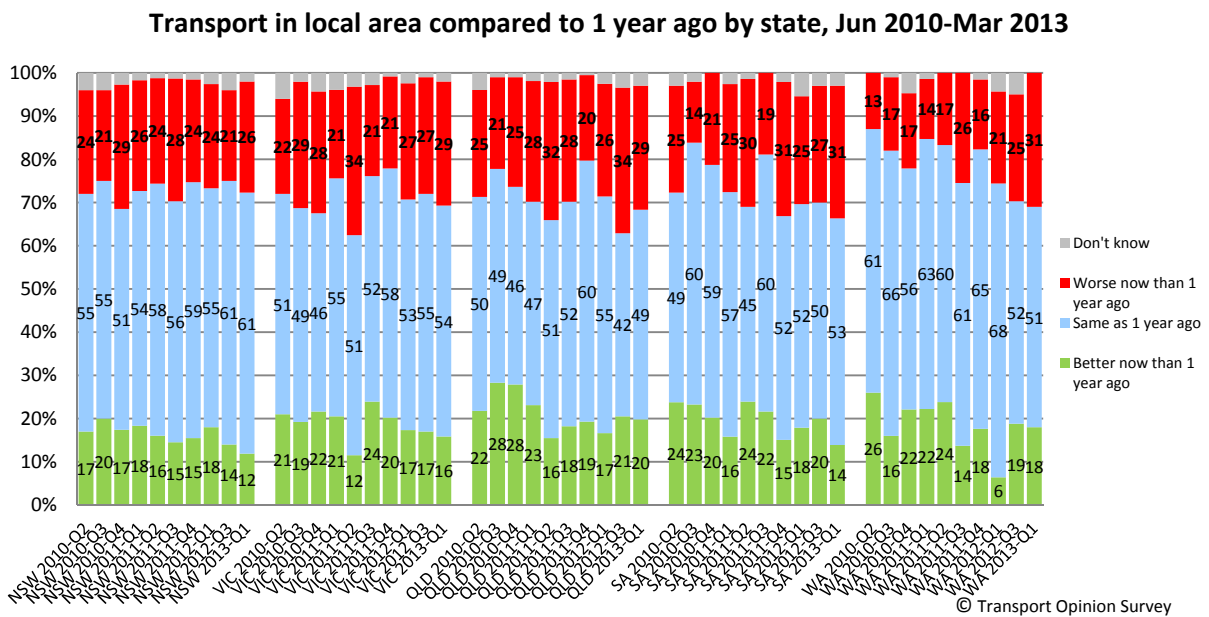
Compared to 1 year ago, do you think the state of transport in general in your local area is better now, the same, or worse now?

- In the March 2013 quarter, 56% of Australians said that transport in their local areas is the same now as one year ago.



Note: Values are given as percentages (e.g., 22 denotes 22%), and responses sum to 100%. The same applies all the following figures.

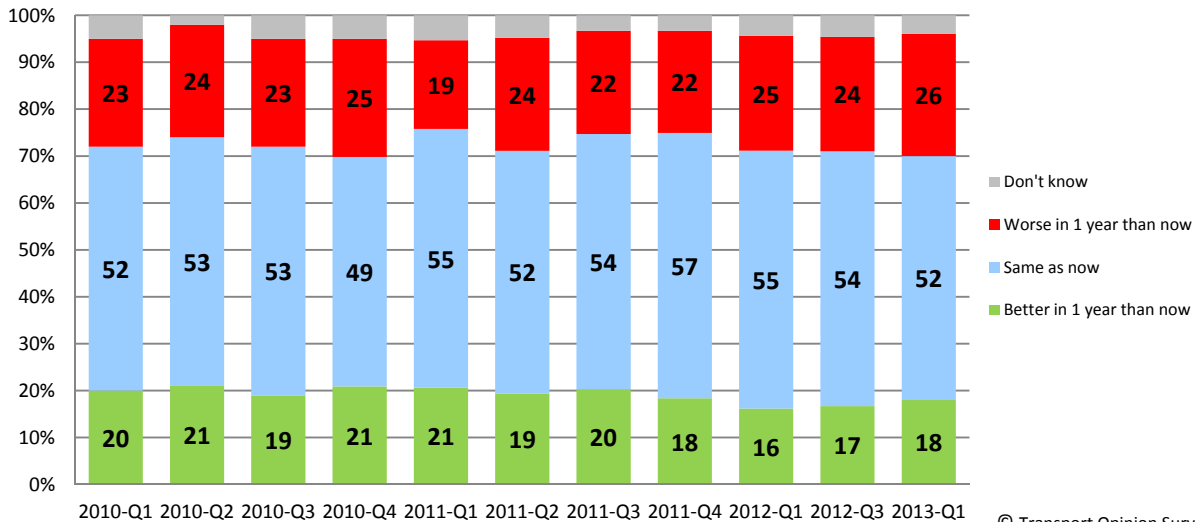
- In the March 2013 quarter, 31% of South Australia and Western Australia residents said that transport in their local areas is worse now than one year ago, higher than other states (26%-29%).



Do you think that in 1 year's time, the state of transport in general in your local area will be better than it is now, the same, or worse than it is now?

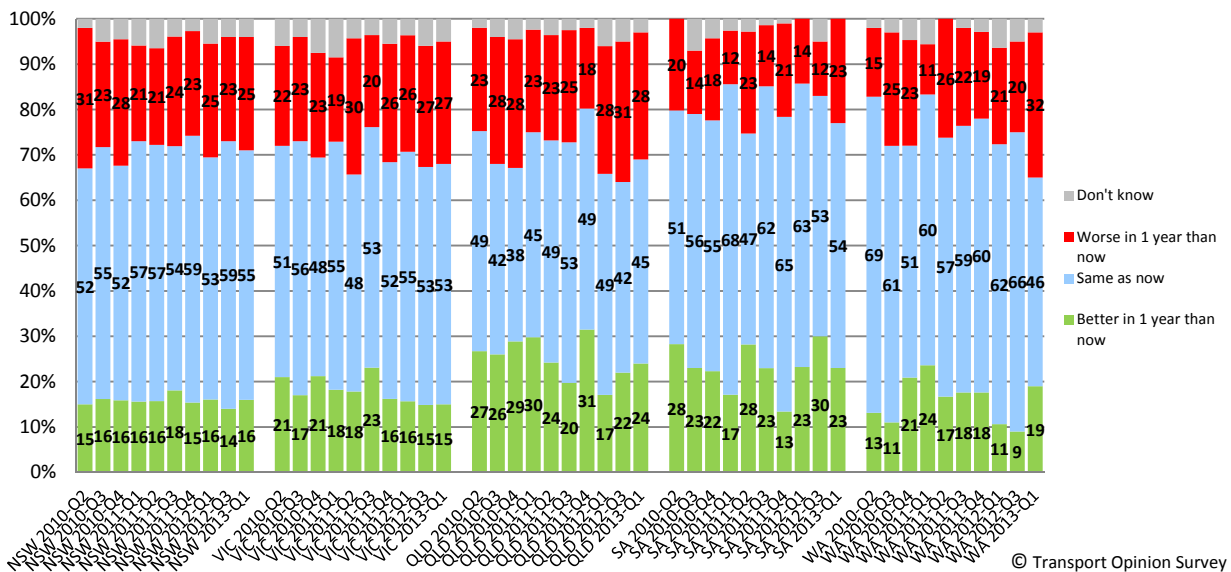
- In the March 2013 quarter, 52% of Australians said that transport in their local areas will be the same in one year's time. Only 18% said transport will be better.

Transport in local area in 1 year (Australia), until Mar 2013



- 24% of Queensland residents believed that transport in their local areas will be better in one year; while only 15% of Victoria believed that transport in their local areas will be better in one year.

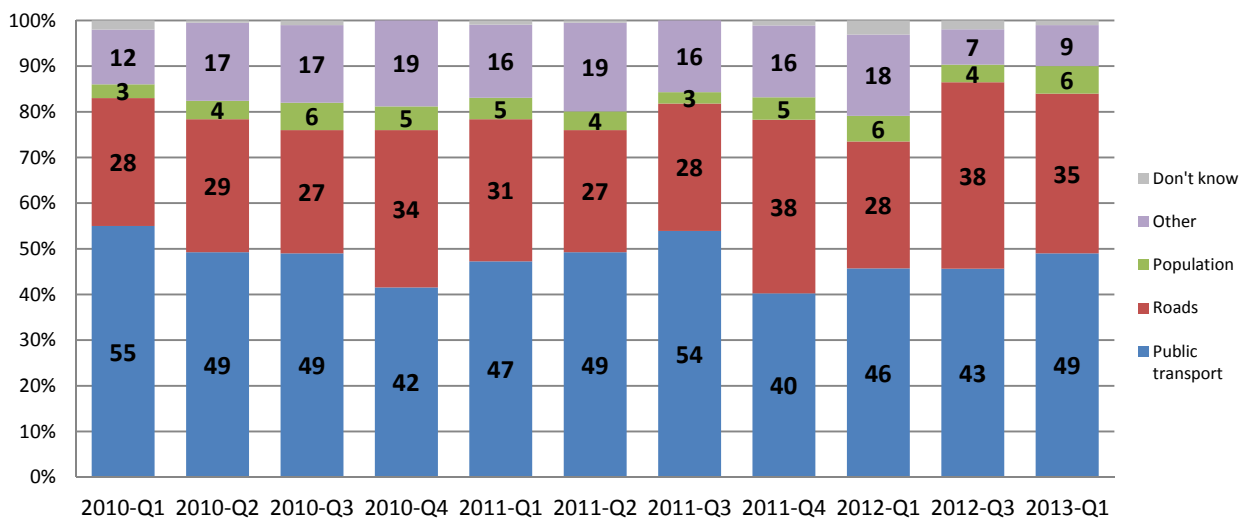
Transport in local area in 1 year by state, Jun 2010-Mar 2013



What were you thinking of most when answering that question [about transport in your local area in 1 year's time]?

- In the March 2013 quarter, the 18% of Australians who said that transport in their local areas will be **better** in one year were thinking about both public transport (49%) and roads (35%) as two major reasons. "Other" includes 9% who were thinking of the government role in integration, planning and coordination.

Transport in local area - reason for being better in 1 year, until Mar 2013

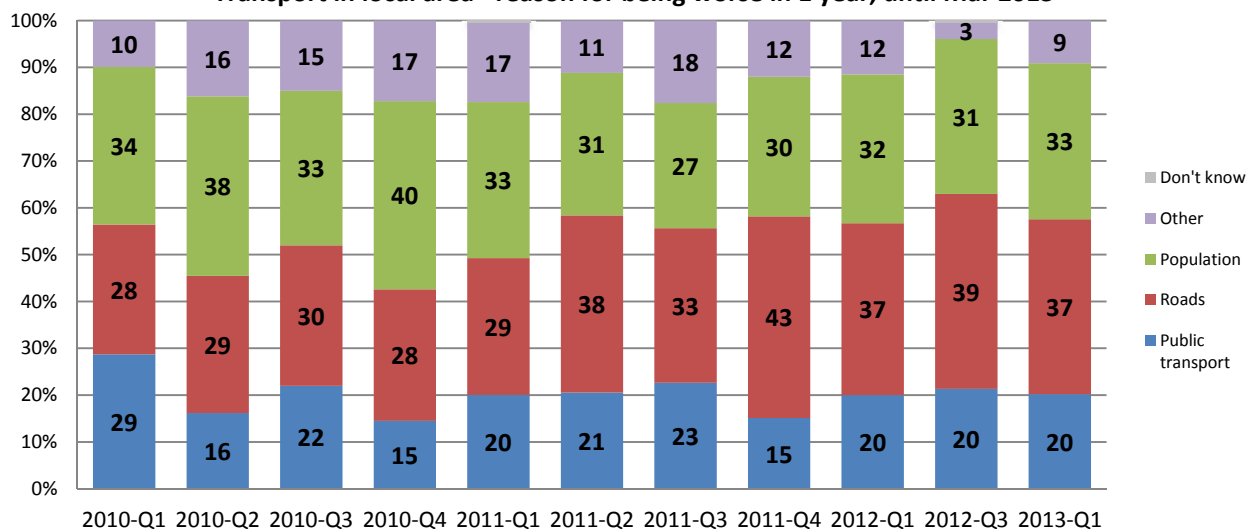


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Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

- In the March 2013 quarter, the 26% of Australians who said that transport in their local areas will be **worse** in one year were thinking about roads (37%) and population-related changes (33%) as two major reasons. "Other" includes 9% thinking of the government role in integration, planning and coordination.

Transport in local area - reason for being worse in 1 year, until Mar 2013



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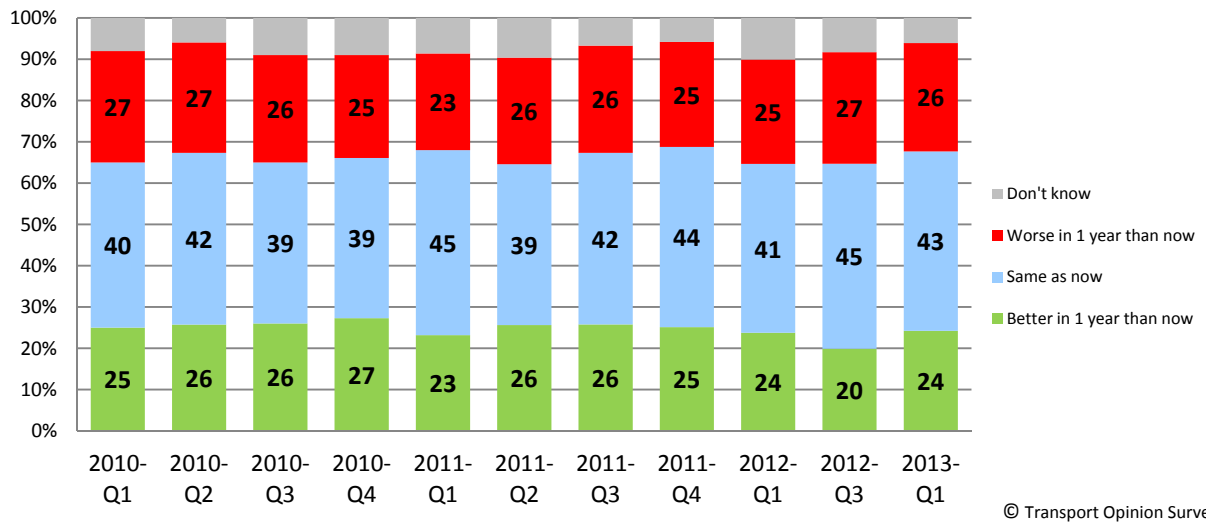
Note: Responses were grouped into the above categories. "Other" includes responses about transport in general, responses about both public transport and roads, and issues not included in other categories.

3. Confidence about transport improving in Australia

Do you think that in 1 year's time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

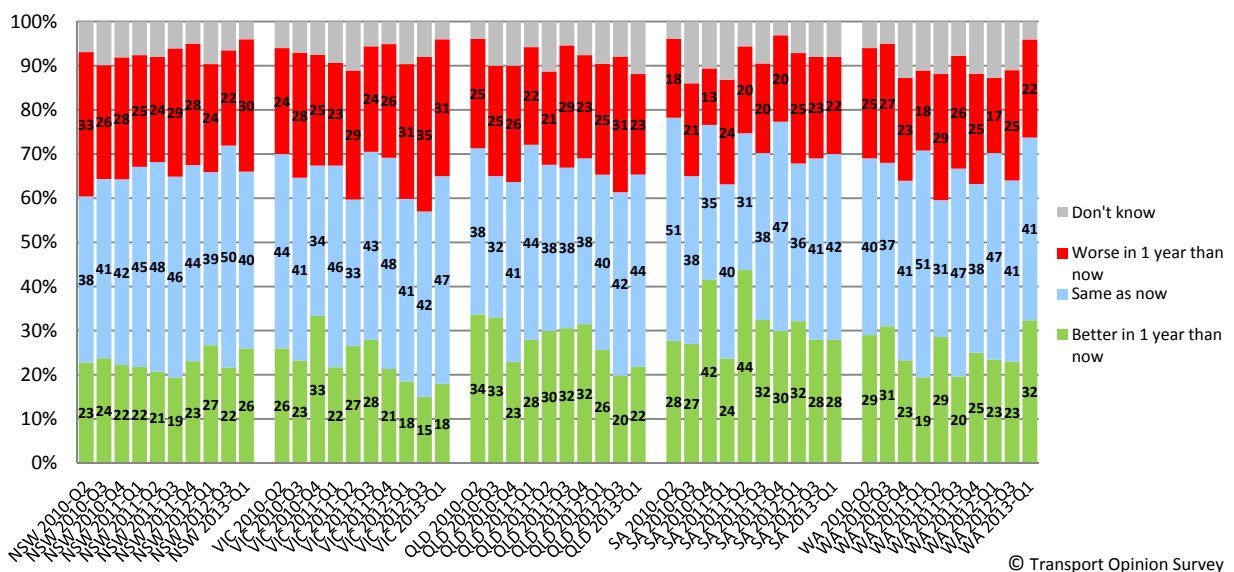
- In the March 2013 quarter, 43% of Australians said that transport in Australia in one year will be the same as now. 24% of Australians said that transport in Australia will be better in one year's time.

Transport in Australia in 1 year, until Mar 2013



- In the March 2013 quarter, 31% of Victoria residents said that transport in Australia will be worse in one year, and 18% said that it will be better. Other states are relatively more confident.

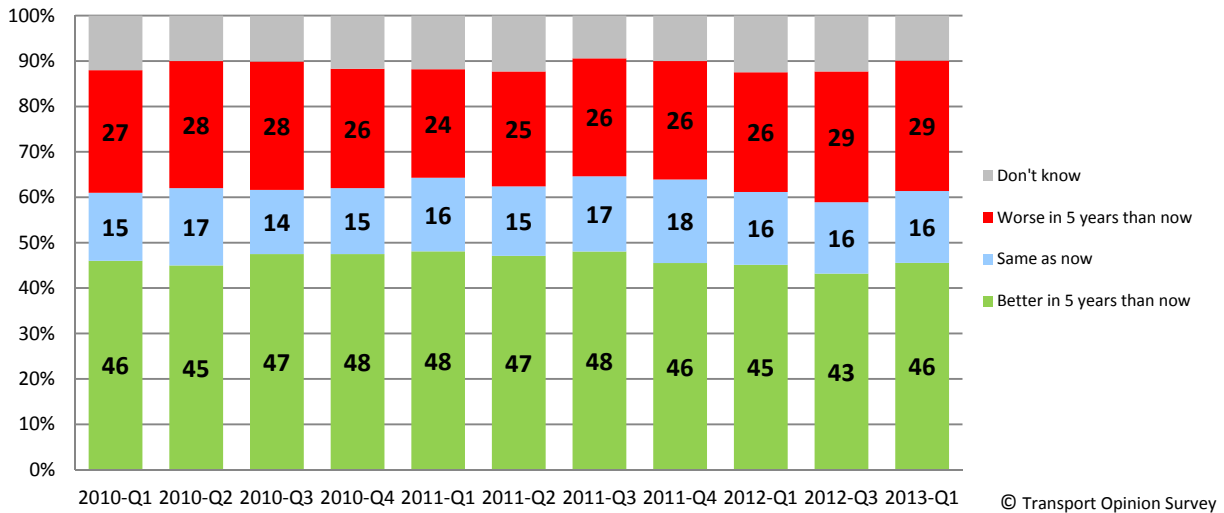
Transport in Australia in 1 year by state, Jun 2010- Mar 2013



Do you think that in 5 years' time, the state of transport in general in Australia will be better than it is now, the same as now, or worse than it is now?

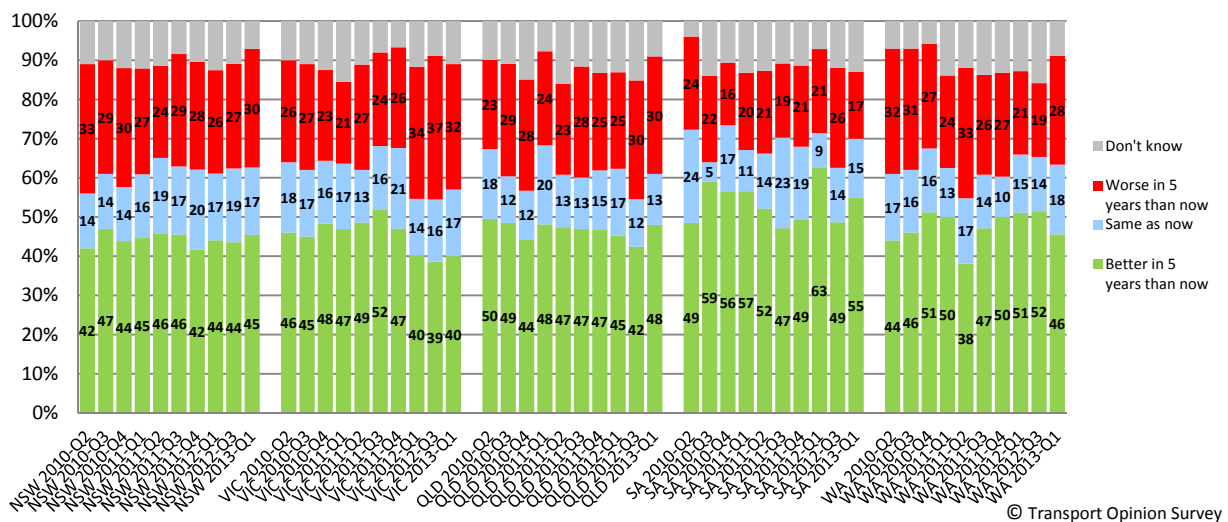
- In the March 2013 quarter, Australians remained more confident that transport will be better in five years than in one year, with 46% thinking transport in Australia will be better in five years.

Transport in Australia in 5 years, until Mar 2013



- In the March 2013 quarter, 55% of South Australia residents think that transport in Australia will be better in five years than now, more confident than people living in other states. In contrast, people living in Victoria are least confident, where 40% said that transport in Australia will be better in five years than now and 32% said it will be worse.

Transport in Australia in 5 years by state, Jun 2012-Mar 2013



4. Change in confidence over time – TOPS Index

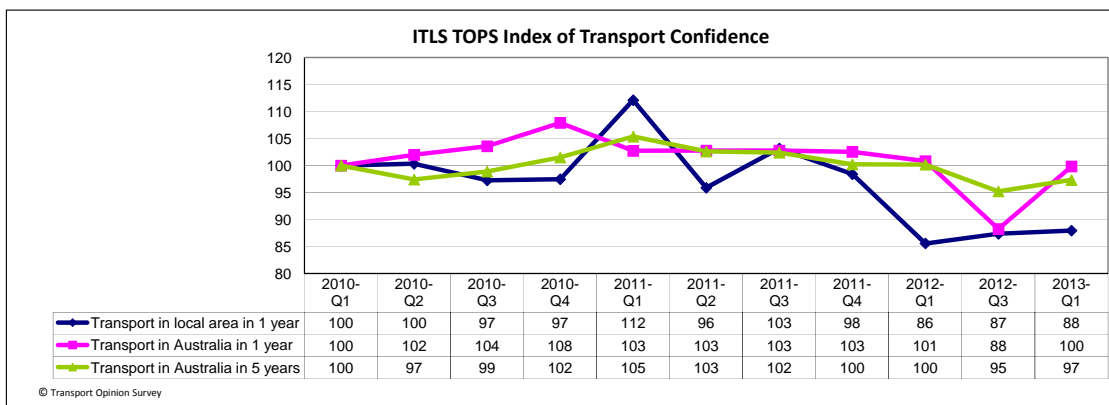
Responses from the first Transport Opinion Survey about transport getting better or worse were used to set an index of 100 for quarter 1, March 2010. Each quarter, changes in community confidence about transport in the local area, transport in Australia in one year's time and transport in Australia in five years' time are reported as changes in the TOPS Index.

A TOPS Index value of more than 100 means that Australians' confidence about transport getting better is stronger than in March 2010, while a TOPS Index value less than 100 means that such confidence is weaker than in March 2010.

The TOPS Index shows that in the March 2013 quarter compared to the September 2012 quarter:

- Australians became slightly more confident about transport in their local area in one year's time
- Australians became significantly more confident about transport in Australia in one year's time
- Australians became slightly more confident about transport in Australia in five years time.

Compared to the launch of TOPS in March 2010, Australians are much less confident about transport in their local areas in March 2013 (Confidence index: from 100 to 88), unchanged about transport in Australia in one year), and slightly less confident about transport in Australia in five years (Confidence index: from 100 to 97).

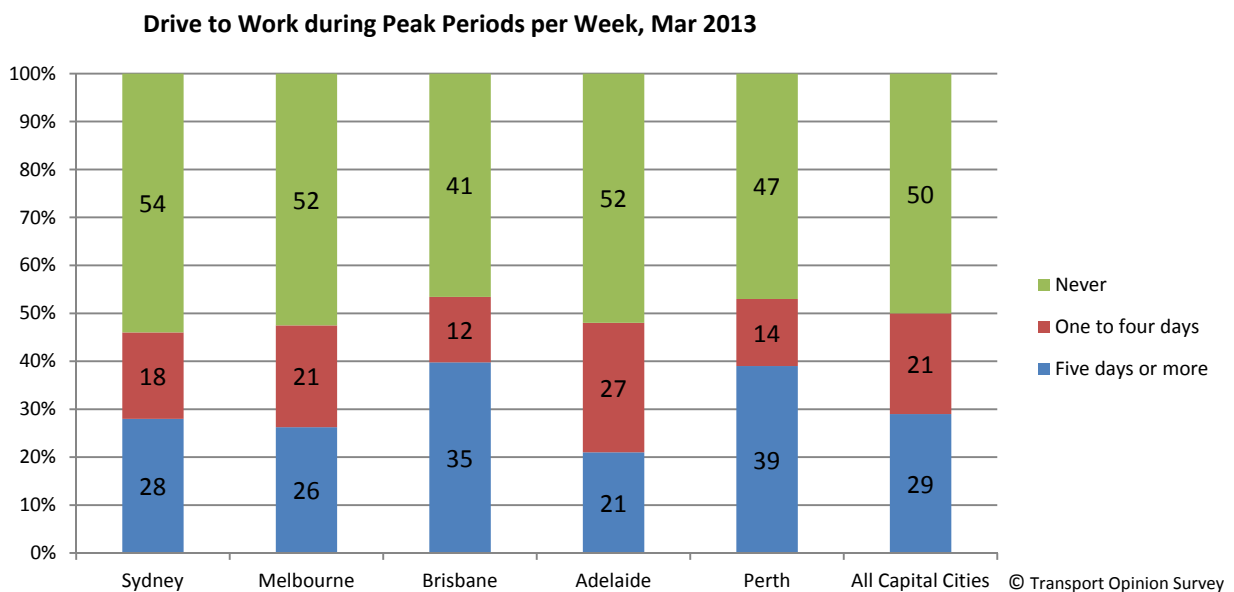


5. Flexibility in Home Departure time of Peak Car Driving Commuters

In the March 2013 quarter, a new question was asked about peak period driving for residents in Australian capital cities:

How many days a week do you drive to work during the peak periods of 7-9am and/or 4:30-6:30 pm?

- Overall, 29% of residents in capital cities drove to work during the peak periods five days or more per week, and 21% drove to work one to four days per week.
- 39% of residents in Perth drove to work during the peak periods five days or more per week, which is the highest amongst all capital cities, whilst only 21% of residents in Adelaide drove to work during the peak periods five days or more per week.

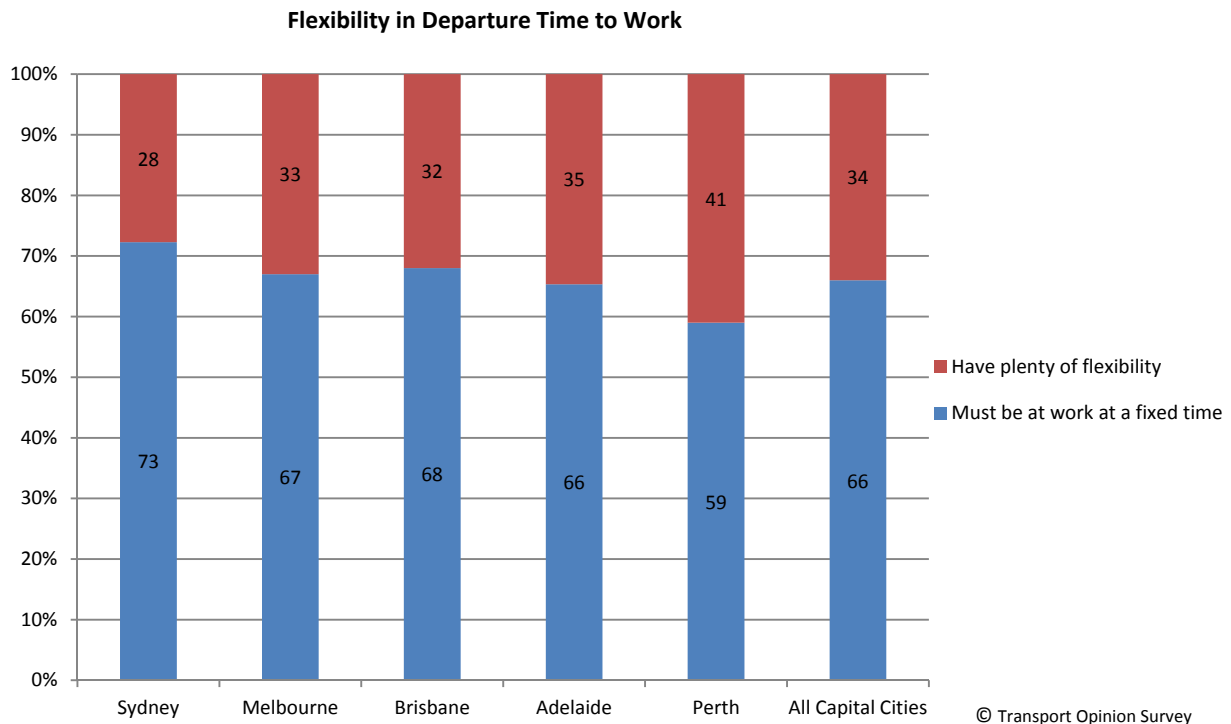


Note: The % in brackets below X-axis for each category indicates the % of respondents in that category of state.

A follow-up question was asked to commuters who drove to work during the peak periods at least once a week regarding their flexibility in their home departure time to work:

How much flexibility do you have in selecting the time that you can depart from home in driving to work so as to avoid the worst traffic congestion?

- 66% of peak car driving commuters in capital cities said that they have no flexibility in selecting the departure time to work as they must be at work at a fixed time, whilst 34% said that they have plenty of flexibility.
- 73% of peak car driving commuters in Sydney said that they have no flexibility which is the highest amongst all capital cities. Car driving commuters in Perth had the most flexibility in selecting the departure time in driving to work (41%) as compared to other capital cities (28%-35%).



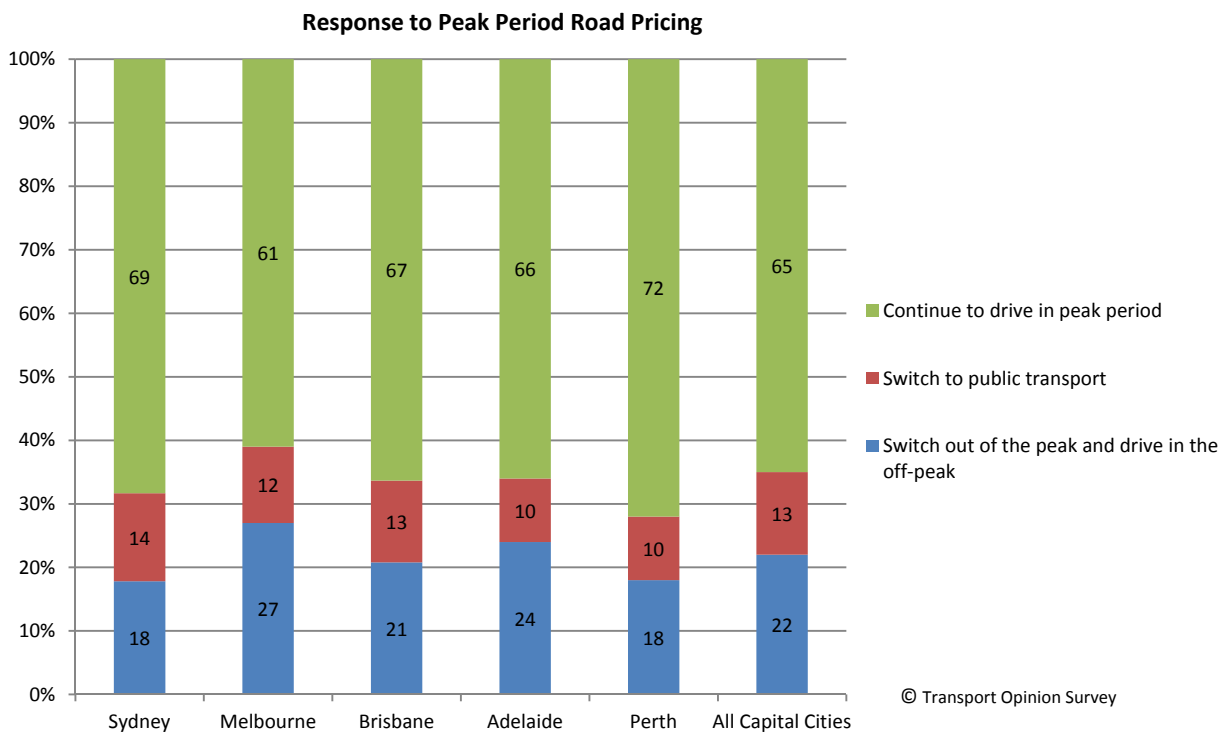
Note: The % in brackets below the X-axis for each category indicates the % of respondents in that category for the State.

6. Response to Peak Period Road Pricing of Peak Car Driving Commuters

A second follow-up question was asked to peak car driving commuters regarding their response to peak period road pricing:

If there was a peak period (7-9am, 4:30-6:30pm) charge of 5 cents per km imposed on all major roads, would you drive in the off-peak, switch to public transport, or continue to drive in the peak period?

- 13% of peak car driving commuters in capital cities said that they would switch to public transport, and 22% would switch out of the peak periods and drive to work in the off-peak periods instead.
- 72% of peak car driving commuters in Perth said that they would continue to drive to work during the peak periods, which is the highest amongst all capital cities, in contrast to 61% in Melbourne as the lowest.



Timing of TOPS

The fieldwork for each quarter was conducted on the following dates:

- March 2010: 13-28 February 2010
- June 2010: 15-30 May 2010
- September 2010: 23 August-5 September 2010
- December 2010: 5-17 November 2010
- March 2011: 9-27 February 2011
- June 2011: 13-30 May 2011
- September 2011: 11-25 August 2011
- December 2011: 4-22 November 2011
- March 2012: 10-26 February 2012
- September 2012: 10-27 August 2012
- March 2013: 23 March-13 April

More information

Visit the TOPS website for quarterly reports, media coverage and to register to receive TOPS updates by email each quarter.

<http://sydney.edu.au/business/itls/tops>

The Institute of Transport and Logistics Studies in The University of Sydney Business School provides education and conducts research in transport, logistics and supply chain management.

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